



# Hoosier Hills Estate Planning Council

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Hoosier Hills Estate Planning Council • c/o Jessica Hidalgo • 812-405-1734 • 813 West 2nd Street. • Seymour, In 47274

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February 2020

Welcome!!

We survived the Thanksgiving and Christmas holidays, the impeachment proceedings have concluded, and President Trump remains in office, the Democratic primaries are underway, and it's virtually impossible to anticipate what tax and wealth transfer policy changes are afoot following the November general election! Now it's time to get back to work and guide our clients through uncertain conditions.

The meeting and program of November 21<sup>st</sup> at Zaharakos in Columbus was a great success. No fewer than six first time attendees were present. We received three inquiries by Members to join the Board of Directors for terms beginning in July for the 2020/2021 Council year. The Board will consider their nominations on May 21<sup>st</sup>.

Our next Member Meeting is set for February 20 at the Salt Creek Golf Club in Nashville. This is a spectacular venue and a wonderful opportunity to bring a guest. Please continue to make every effort to reach out to your colleges and other professionals and bring them to our meetings. We have two information packed programs in store for the February 20 meeting. Gary Lent and Jeff Curtis of The Watermark Group of Indianapolis will present "Retirement Sunsets & Dreams" and the "Dream Manager" concept regarding planning with retirement assets. Bradley Minor of Blue and Company will present "Succession Planning for Small/Family Businesses."

Our last Member meeting for the program year will be on May 21<sup>st</sup> at the Bloomington Country Club. Please mark your calendar. Speakers and topics will be announced in advance. I would like to take this opportunity to encourage you to renew your membership and payment of dues. Please support your Estate Planning Chapter with your continued membership. We are actively exploring continuing education topics and looking for speakers. We have potentially two outstanding speakers lined up for May; however, we encourage your suggestions for the September 2020 program. Please volunteer. If you have interest in preparing a program and speaking as part of our continuing education program, please contact me at 317-888-1667.

On behalf of the Board of Directors, we wish you a prosperous 2020. We look forward to seeing as many of you as possible at the Salt Creek Golf Club on February 20<sup>th</sup>.

Best regards,  
Dave Maschino  
President